



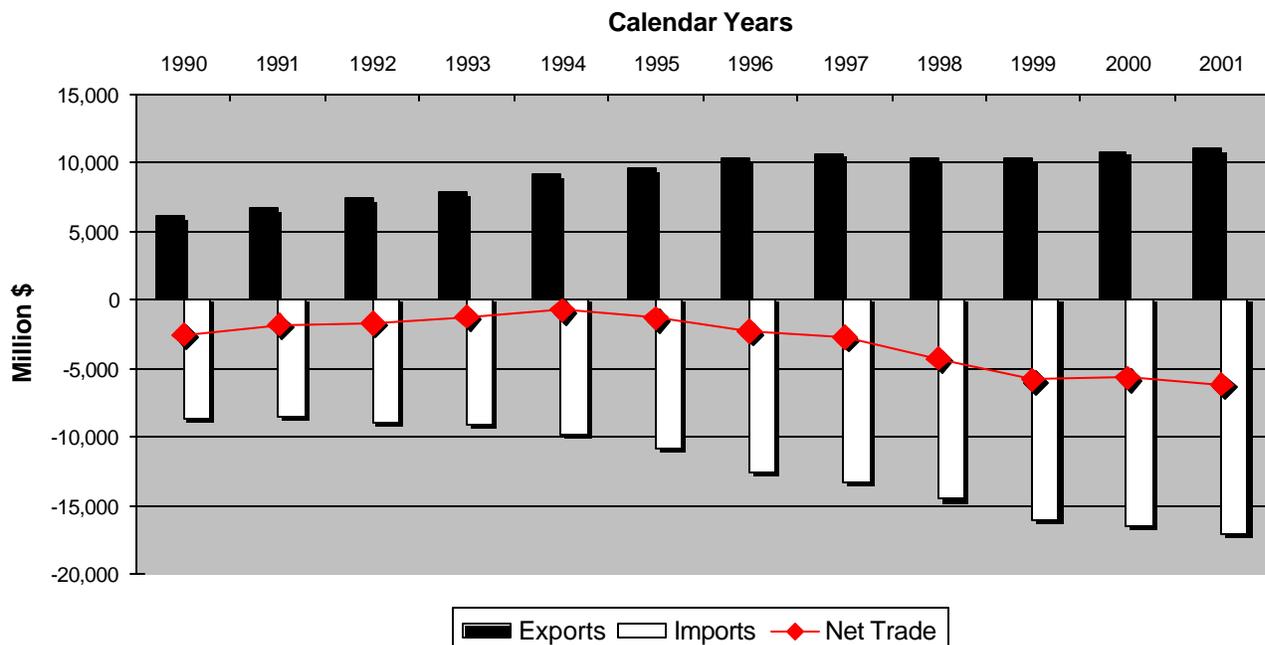
United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Circular Series  
FHORT 04-02  
April 2002

# World Horticultural Trade and U.S. Export Opportunities

## U.S. Horticultural Trade Deficit Reached a Record in CY 2001



*Includes fresh and processed fruits, vegetables, tree nuts, nursery products, flowers, wine, beer, juices, and miscellaneous, as defined by FAS.*

Over the period 1991-2001, U.S. imports of horticultural products rose from \$8.6 billion to \$17.2 billion, while U.S. exports of horticultural products rose from \$6.6 billion to \$11 billion. Key factors behind the rise in imports include: the relatively open U.S. import regime (U.S. bound agricultural tariffs average 12 percent compared with the global bound average of 62 percent); the strong dollar which has made imported products relatively less expensive; the growth in the U.S. population from about 253 million in 1991 to 280 million in 2001; the rise in U.S. GDP per capita from \$24,000 in 1991 to about \$35,000 in 2001; total per capita consumption of fruits and vegetables rose 19 percent from 1982 to 1997. Key factors limiting export growth: the strong dollar has hindered U.S. competitiveness abroad; many countries continue to maintain restrictive market access policies, primarily in the form of high tariffs; increased competition, as some countries, such as those in the European Union, have raised levels of horticultural production by providing direct and indirect subsidies and other assistance; economic slowdown in key consuming countries, such as Japan.

**[Check Out the New U.S. Trade Internet System Website. Go to  
<http://www.fas.usda.gov/ustrade>]**

**For further information, contact:**  
 U.S. Department of Agriculture - Foreign Agricultural Service  
 Horticultural and Tropical Products Division  
 1400 Independence Ave., S.W. Stop 1049  
 Washington, DC 20250-1049  
 Telephone: 202-720-6590  
 Fax: 202-720-3799  
<http://www.fas.usda.gov/htp>

**Frank Tarrant, Director**  
**Scott Bleggi, Deputy Director for Marketing**  
**Brian Grunenfelder, Deputy Director for Analysis**

<u>ANALYSIS</u>		
Nancy Hirschhorn	202-720-2974	Situation & outlook supervisor, publication editor, export forecast coordinator, briefing paper coordinator, key development coordinator
Erik Hansen	202-720-0875	Tree nuts, processed vegetables (excl. potatoes), EU trade policy, circular team & homepage coordinator
Bob Knapp	202-720-4620	Canned deciduous fruit, sugar
Edwin Lewis	202-720-5028	Kiwifruit, stone fruit, nursery products, avocados, NAFTA quarterly report, circular web team
Emanuel McNeil	202-720-2083	Fresh vegetables (excl. potatoes), cut flowers
Heather Page Velthuis	202-720-9792	Wine, brandy, table grapes, grape juice
Debra A. Pumphrey	202-720-8899	Fresh and processed citrus, coffee, trade questions on tea, cocoa, essential oils & spices, & information technology coordinator
Rey Santella	202-720-0897	Dried fruit, berries, beer/hops, melons, circular web team
Sam Rosa	202-720-6086	Fresh deciduous fruit, trade issues database coordinator, apple juice, olives, mushrooms
Ryan Scott	202-720-6877	Special projects, circular web team, tropical fruit
Martin Patterson	202-720-7304	Policy issues coordinator for subsidies & tariff issues, tariff rate quotas & licensing, trade agreements, multilateral policy issues, biotechnology issues, SPS/food safety/quality issues coordinator, bilateral technical & policy issues
<u>MARKETING</u>		
Steve Shnitzler	202-720-8495	Apricots, avocados, ginseng, pomegranates, Bartlett pears, kiwi
Ted Goldammer	202-720-8498	Potatoes (marketing & analysis), apples, hops, sweet cherries, QSP
Sonia Jimenez	202-720-0898	Citrus, winter pears, peaches, plums, nectarines, Section 108
Kristin Kezar	202-690-0556	Tart cherries, canned fruit, papaya, melons, raisins
Elizabeth Mello	202-720-9903	Vegetables, berries, Cochran/EMO programs, Produce Marketing Association (PMA), Chocolate Manufacturers Association
Ingrid Mohn	202-720-5330	Tree nuts, prunes (dried plums)
Elias Orozco	202-720-6791	Honey (analysis & marketing), website updates
Yvette Wedderburn Bomersheim	202-720-0911	Wine, brandy, grape juice, table grapes, Export credit programs

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## **Export Summary**

U.S. exports of horticultural products to all countries in January totaled \$832 million, an increase of 2 percent from the same month a year earlier. The categories with increases in January were tree nuts (up 19 percent to \$87 million), essential oils (up 4 percent to \$54 million), fresh fruit (up 16 percent to \$161 million), and fresh vegetables (up 1 percent to \$103 million). The categories with the most significant decreases were fruit and vegetable juices (down 22 percent to \$48 million), miscellaneous horticultural products (down 7 percent to \$161 million), and wine and beer (down 5 percent to \$42 million).

January 2002 exports to Canada were up 7 percent from January 2001 to \$270 million, while exports to the European Union fell 4 percent to \$147 million, sales to Japan fell 12 percent to \$109 million, and sales to Mexico fell 13 percent to \$71 million. Exports to several Asian countries showed significant growth in January 2002 compared with the previous year. Exports to Hong Kong were up 34 percent to \$36 million, exports to Korea rose 40 percent from January 2001 to \$28 million, exports to Taiwan rose 52 percent to \$19 million, and exports to China rose 25 percent to \$16 million.

Exports for the Fiscal Year (FY) 2002 period were down almost 2 percent from the same period in FY 2001 to \$3.7 billion. Tree nut exports were up about 4 percent to \$552 million for the October-January 2001 period, while essential oils exports were up 8 percent to \$214 million, and processed vegetables rose about 1 percent to \$547 million. All other categories declined. Exports to Canada rose less than 1 percent to \$1.06 billion for the October-January period, while exports to the European Union and Japan fell 4 percent and 9 percent respectively, compared with the same period in FY 2001. The fastest growing markets for FY 2002 to date are: India, up 38 percent; Korea, up 23 percent, China, up 12 percent and Mexico, up 10 percent. Export to most other major markets declined during the October 2001-January 2002 period from the same period in FY 2001.

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To access FAS Attache Reports online, please reference the following Internet address:

<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries. Search by keyword, including country and commodity.

**What-s New on the Homepage?**

The Horticultural & Tropical Products Division has introduced an enhanced feature on its homepage designed to bring the latest information to the public as efficiently as possible. The site will contain information on policy and technical developments affecting trade in horticultural commodities, as well as selected reports submitted by FAS overseas offices and special reports prepared by the division. The information will typically remain on the site for approximately one month, before being archived. For further information on this new feature, please contact Nancy Hirschhorn (202) 720-2974. Go to <http://www.fas.usda.gov/htp/> and click on "What's New?"

## Situation and Outlook for Macadamia Nuts

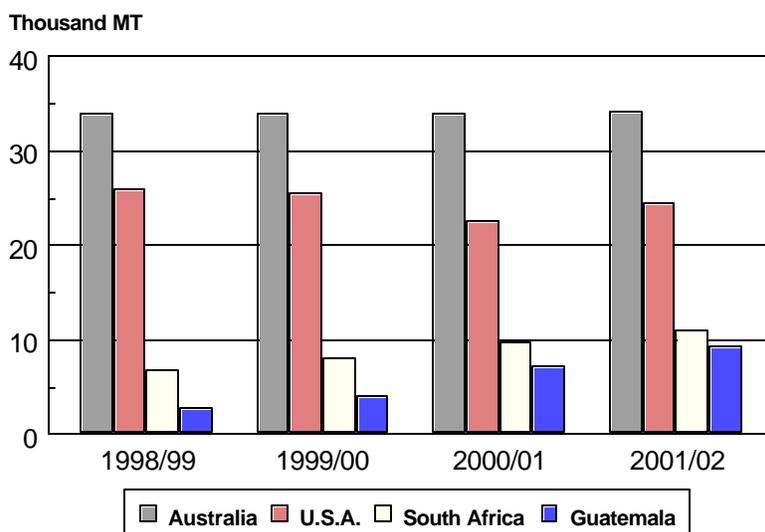
Macadamia nut prices continue to fall in the United States as a result of world oversupply. Total world supplies are forecast at a record 118,688 tons for 2001/02, up 8 percent from last year. Forecasted acreage and yield increases in Australia and South Africa, the world's first and third largest producers, respectively, are expected to increase world supplies even more in 2002/03. The lingering effects of the economic crisis in Asia, the largest regional market for U.S. exports, are disappearing. However, stiff competition from other macadamia producing countries and a strong U.S. currency continue to weaken demand for U.S. exports. Exports from selected countries are forecast to increase 16 percent to a record 58,952 tons. Australia remains the world's largest exporter of macadamias, accounting for 46 percent of total world exports. The United States, the world's second largest producer, is the largest single export market for Australia, South Africa, Guatemala, Brazil, and Costa Rica.

### GLOBAL PRODUCTION

World production of macadamia nuts is expected to reach 87,754 metric tons in 2001/02, up 8 percent from the previous year. Approximately 40 percent of all the macadamia nuts produced worldwide originate from Australia.

The top four producers in 2001/02 are Australia (34,300 tons), United States (24,494 tons), South Africa (11,000 tons) and Guatemala (9,360 tons). Other key producers include Costa Rica and Kenya.

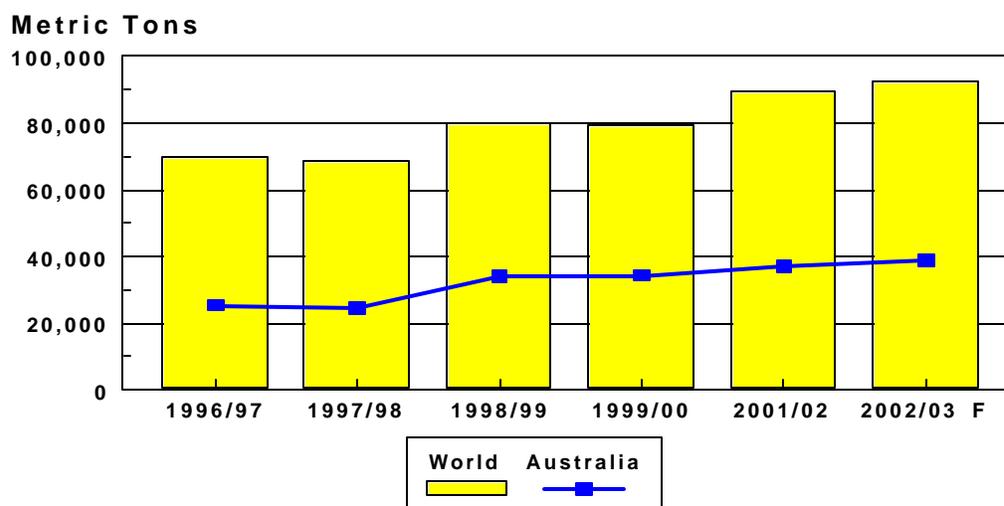
### Top 4 Producers of Macadamia Nuts



## Australia

Australia is the world's largest macadamia nut producer. Output in 2001/02 is forecast at 34,300 tons, an average size crop. Although the season started well for macadamias, a return to normal weather conditions in mid-season slightly reduced yield potential. Climatic conditions deteriorated further in the lead up to harvest, with the crop experiencing hot and dry conditions. High wind and low humidity during this time adversely affected soil moisture, further reducing yield potential. As a result, the crop achieved only average yields. Commercial production has traditionally been centered in northeastern New South Wales with some production in southeastern Queensland. However, as a result of recent planting, Queensland now accounts for around 40 percent of total production. New South Wales produces over half of Australia's production, while small plantings exist in Western Australia. Macadamia trees require rich soils and high annual rainfall or irrigation to produce commercial quantities of nuts.

### Australian Contribution to World Production



## Guatemala

The Guatemala nut crop for 2001 is estimated at 9,360 tons benefiting from favorable weather conditions. Average yields for 2001 are estimated at 5.8 tons/hectare, up from the previous year's average of 4.9 ton/hectare. Increases in yields are mainly due to maturing trees and good agricultural and management practices. In 2002, production is forecast to increase to 9,800 tons, with average yields expected to remain steady at 5.8 tons/hectare. Some increases in yields are expected in the next five years as new plantings begin bearing fruit, new trees are planted and older trees mature.

Guatemala's planted area for macadamia nuts during 2001 is estimated at 3,760 hectares, of which 1,610 hectares were harvested. Planted area for 2002 is expected to increase to 3,875 hectares as new trees are planted. Harvested area is expected to increase to 1,690 hectares as young trees begin bearing fruit. Planted area and harvested area vary since many plantations are not yet in production due to new trees planted.

## **Kenya**

Macadamia nuts experienced an upsurge in production to 5,800 tons in 2001, due to improved weather conditions after the drought experienced in 1999/2000, marginal increases in bearing trees, and slight improvements in agronomic practices. There has also been modest expansion in the area planted and greater focus placed on protected cropping. The area under macadamia, presently estimated at 8,000 hectares, is expected to increase slowly. During the first six months of 2001, demand for planting material started picking up due to favorable rains in production areas.

## **South Africa**

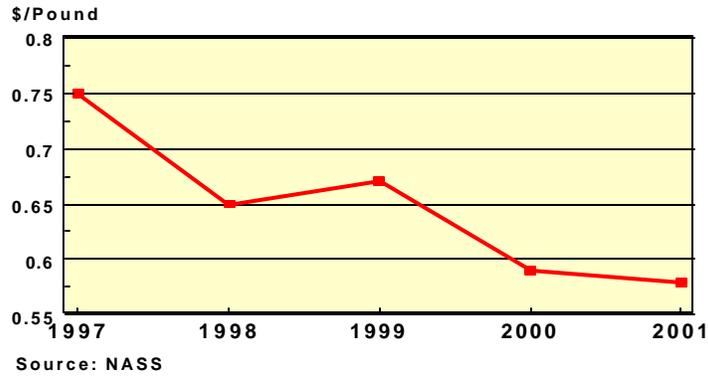
South African macadamia production in 2002 is expected to increase by 15 percent from the previous year to 11,000 tons. This is due to the alternating “on year” nature of the trees, favorable weather conditions, expanded area, and an increase in the number of bearing trees. The industry is expected to continue to expand in the next five years or so because of the establishment of new production areas. Expansion includes the recent establishment of a 600-hectare macadamia orchard in Maclands of the Northern Province by Macadamia Industrial Development Corporation’s subsidiary, Sapekoe. New production areas have also been established in Mpumalanga, around White River and Nelspruit, and Kwazulu Natal in the South Coast.

## **United States**

Hawaii’s 2001-02 preliminary macadamia nut crop is estimated at 24,494 tons, up 8 percent from last season’s crop, according to the Hawaii Agricultural Statistics Service (HASS). Total crop acreage is a little less, although there was a slight increase in harvested acreage. Weather during the past year had mixed effects on orchards, depending on location. South Kona orchards continued to experience the prolonged drought, reducing yields, while normally very wet areas had better than expected weather. Overall yields averaged 3.03 pounds per acre, 210 pounds above last year. The preliminary farm price for net, wet in-shell macadamia nuts averaged 58.0 cents per pound, down 1.0 cent from the 2000/01 average. Farm prices have not been this low since the 1978-79-crop season. The farm value of macadamia nuts totaled \$31.3 million, up 6 percent from last season. Ongoing foreign competition continued to put downward pressure on the prices received by Hawaii’s growers.

Total acreage in crop dropped 400 hectares from the previous year to 7,284 hectares, the lowest total since 1984/85. Harvested area increased by 40.5 hectares totaling 7,203 hectares. Some growers have replanted other crops. The statewide estimate of macadamia nut trees totaled 1.3 million, of which virtually all were 6 years and older. For the first time since 1946, most of the total area is harvested area.

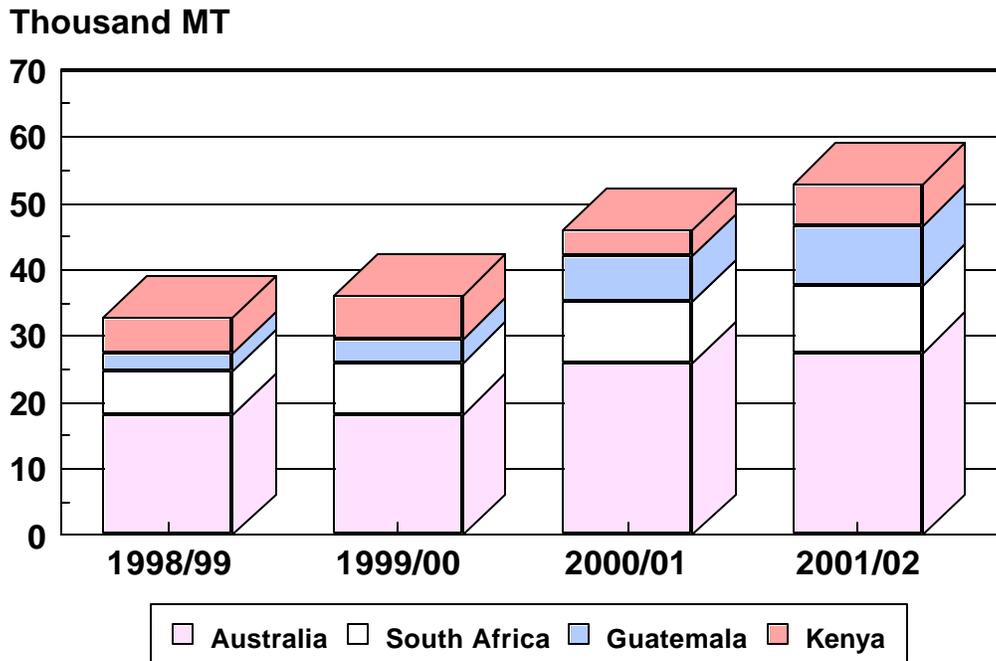
### U.S. Macadamia Farm Price is Falling



### GLOBAL TRADE

Total world exports are expected to reach 58,952 tons in 2001. This is a 16 percent increase from 2000 and a 39 percent increase from 1999. Approximately 40 percent of the world's exports in 2001 originate from Australia. All major producing countries are expected to increase their exports, with Kenya and Guatemala showing the largest percentage increase compared to last year.

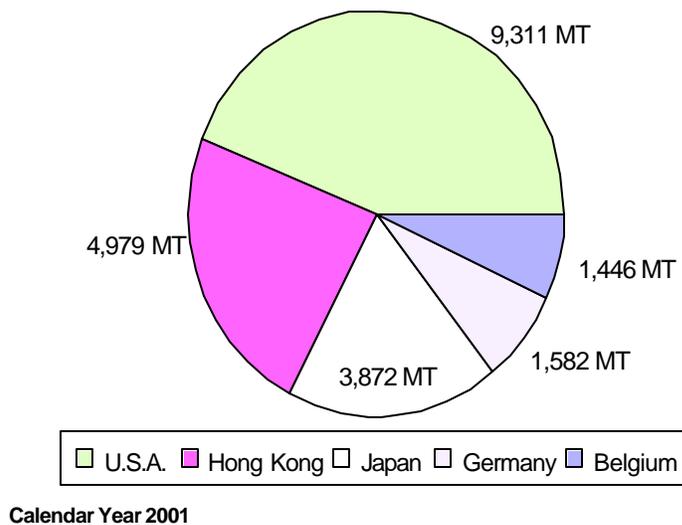
### Top Macadamia Nut Exporters



## Australia

Total macadamia nut exports are expected to reach 27,300 tons in 2001/02, up 5 percent from last year. Low domestic prices and a weak Australian dollar have kept exports high during a period of average production. Industry sources have described export demand as high and are concerned that supply is not adequate to fully service export markets. While the three largest export markets continue to be the United States, Hong Kong, and Japan, their share of total exports fell for the second year in a row from 68 percent in calendar year 2000, to 66 percent during the period March to November 2001. This is in line with industry efforts to continue diversifying export market opportunities away from the larger markets such as the United States. Although export volumes to many smaller markets decreased, markets where Australian industry has previously been active in promotion (such as Germany) increased in volume. Exports to the United States for the period March to February 2001/02 fell to 5,478 tons, compared to the 8,282 tons reached in the same period of the previous year. Lower stocks and increased penetration in other countries such as Belgium contributed to this development.

### Australian Exports of Macadamias



## Guatemala

Macadamia nut exports for calendar year 2001 reached 9,000 tons, a 22-percent increase from the previous year. During that same year, 25 percent of exports were on a shelled-kernel basis and 75 percent were as a finished good product. The United States continues to be Guatemala's largest export market, reaching 4,500 tons in 2001. Exports in calendar year 2002 are forecast to once again increase to 9,500 tons. The average macadamia kernel export price during 2001 was between \$2.80 and \$2.90 per pound. In 2002, the average price is expected to remain steady at the \$2.80 per pound level. According to the two exporting companies, their marketing efforts for the next five years will be to increase exports, especially to their strongest market, the United States. Producers are receiving technical assistance from both exporting companies in order to improve the Guatemalan macadamia nut quality.

## Kenya

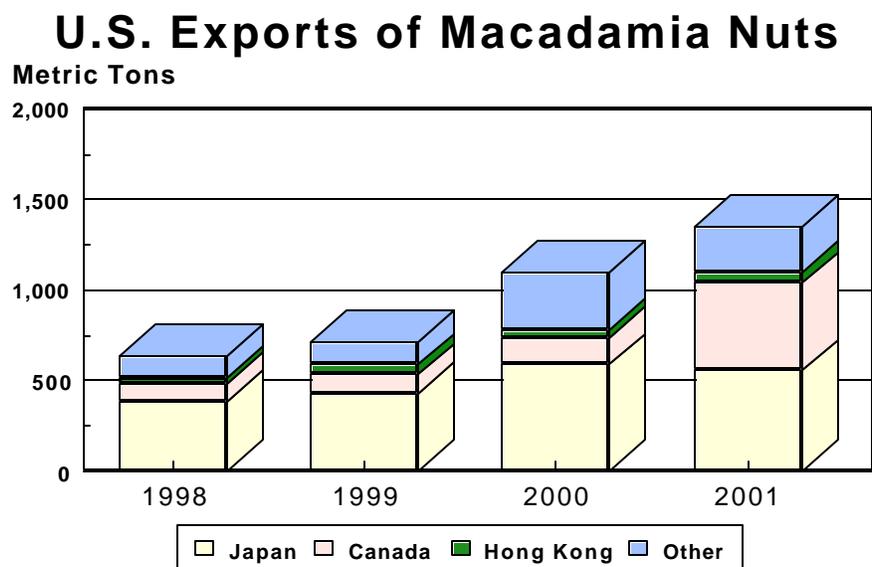
Total macadamia nut exports are expected to reach 6,052 tons in 2001/02, up 54 percent from last year. Japan, Germany, and the United States are Kenya's biggest export markets for macadamia nuts, with Japan taking in almost 70 percent of the exports. Exports to Japan are expected to go even higher during the year 2002. Due to attractive terms of payments and non-demanding production conditions of the macadamia tree, it is very likely that production will continue to rise.

## South Africa

Macadamia nut exports for calendar year 2001 reached 10,400 tons, a 13-percent increase from the previous year. The United States and Europe continue to be South Africa's largest export market. Exports in calendar year 2002 are forecast to once again increase to 11,400 tons. The average macadamia kernel export price during 2001 was between \$1.05 and \$1.10 per pound. In 2002, the average price is expected to remain steady at the \$1.10 per pound level. The industry exports about 90 percent of its total production.

## United States

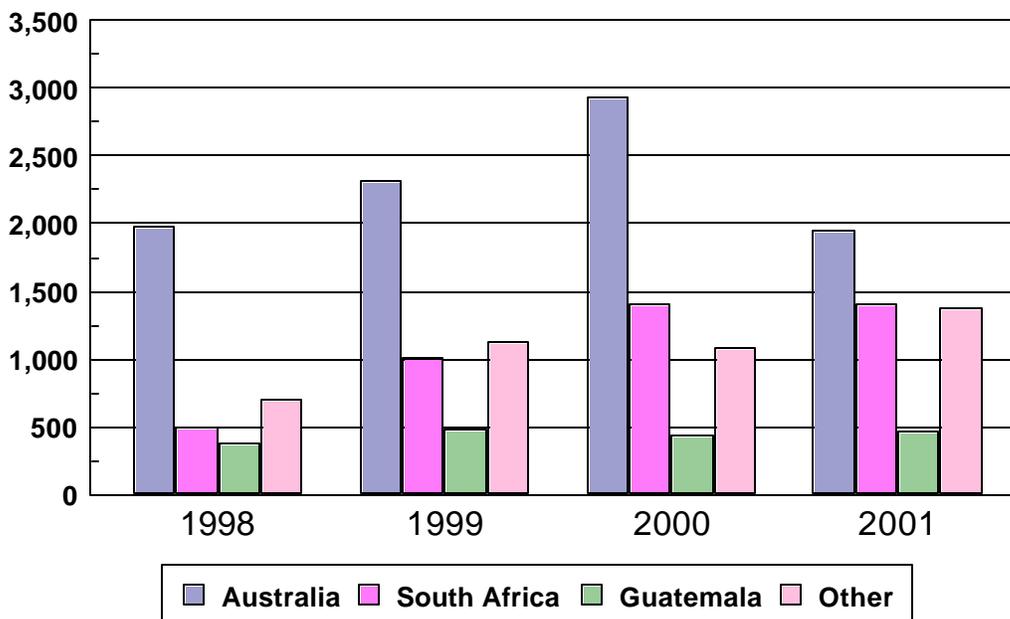
Total macadamia nut exports are expected to reach 4,300 tons in 2001/02, up 43 percent from last year. Japan, Canada, and Korea are the United States three largest export markets for macadamia nuts. Japan is still the largest single country market, purchasing almost 42 percent of U.S. macadamia exports. The United States exports mostly prepared or preserved macadamias. With the exception of Hong Kong and Taiwan, Asian markets are doing well compared to last year. U.S. exports of macadamia nuts to Korea, Singapore, China, and the Philippines have all increased. Sales to Canada, the United States second largest market increased 224 percent from the previous year, reaching 482 tons. However, sales to other important markets, including the Netherlands, decreased.



Total macadamia nut imports are forecast to decrease slightly to 23,875 tons, due to increased production in the United States. Other macadamia producers are slowly expanding production for export to the United States, the world's largest macadamia consumer. Rising U.S. consumer income and spending have been a big factor in soaking up some of the excess world supplies. Additionally, U.S. food processors report difficulties in procuring a steady 12-month supply from Hawaii. The majority of macadamia imports are bulk and industrial product intended for processing.

## U.S. Imports of Macadamia Nuts

Metric Tons



Source: U.S. Census Bureau

## CONSUMPTION AND MARKETING

Consumption for selected countries (Australia, Costa Rica, Guatemala, Kenya, South Africa, and the United States) is expected to reach 54,608 in 2001, up slightly from the previous year. Increases in domestic consumption are found in Australia, Costa Rica, Guatemala, and the United States.

### Australia

Domestic consumption data does not exist in Australia. Some industry representatives contend that domestic consumption is about 5,000 tons and is relatively stable. However, many experts believe that this figure is too low and put domestic consumption at around 9,000 tons for 2001/02. The vast majority of macadamia nuts consumed domestically are in the form of kernels or in value-added products. Increasing amounts of kernels are used in restaurants and the food service industry. Horticulture Australia Ltd. (HAL) has worked to increase macadamia usage in home and restaurant recipes.

Traditionally, the two major horticultural organizations in Australia have been the Horticultural Research and Development Corporation (HRDC) and the Australian Horticultural Corporation (AHC). The HRDC was responsible for research and development and the AHC was responsible for promotional activities. Both organizations were funded by levies paid by growers and received pro-rata government funding for specific purposes. HAL is the new organization that replaced the AHC and HRDC on February 1, 2001. The focus of the new company is the marketing and promotion of horticultural products in both domestic and export markets as well as promoting the uptake and commercialization of new technology.

## **Guatemala**

Macadamia consumption in Guatemala continues to be at a low level because of high market prices, low purchasing power of most Guatemalans, and the lack of consumer awareness. Most Guatemalans are not familiar with macadamia nuts and their uses, but this is starting to change. The brand John Macadam has found acceptance for macadamia by-products such as oils, confectioneries, processed nuts, and especially cosmetics, creating a niche market for macadamias. Local retail prices for macadamia are around \$9.00 per pound. In 2001, Guatemala consumed 360 tons of macadamia nuts. In 2002, local consumption is expected to remain steady due to stalled consumption patterns of higher valued items in response to the difficult economic situation.

Plantaciones Nuez del Pacifico, which markets under the John Macadam brand, has begun to penetrate new niche markets with different macadamia by-products. There is a relatively small but growing up-scale end of the food and small market industry in Guatemala. The increase in quality hotels and tourism will add the local consumption of macadamia nuts and further processed products.

## **Kenya**

Local consumption is minimal as most of the processed macadamia kernels leave the country for overseas markets. It is assumed that the balance between exports and production is consumed domestically and in neighboring countries. Domestic consumption is estimated at about 40 tons of processed kernels. The sector suffers from lack of awareness and the prohibitive prices, due to the high processing costs.

The marketing sector has one sole processor, the Kenya Nut Company (KNC), following the closure of the Kenya Farm Nut Company about two years ago. That company used to export its processed kernels to the United States, a market that the KNC seems to be following very closely. As a marketing tool, the KNC has branded its macadamia (Out of Africa) and is aggressively promoting them in both the international and local markets.

## **South Africa**

Local consumption is minimal as most of the macadamia nuts are destined for overseas markets. South Africa exports about 90 percent of its total production. It is assumed that the balance between exports and production is consumed domestically. Domestic consumption is estimated at about 500 tons, unchanged

from the previous year. Macadamia consumption in South Africa continues to be at a low level because of high market prices and low purchasing power of most of its people, and the lack of consumer awareness.

## **The United States**

The United States is the world's largest consumer of macadamias. In 2001/02, domestic consumption is expected to reach 44,069 tons, up slightly from the previous year. This number is expected to grow. Macadamia producers around the world are slowly expanding production for export to the United States. Rising U.S. consumer income and spending have been a big factor in soaking up some of the excess world supplies. Additionally, U.S. food processors report difficulties in procuring a steady year-round supply from Hawaii. The majority of macadamia imports are bulk and industrial product intended for processing.

*The Attaché Report search engine contains reports on the macadamia industry for several countries including Australia, Guatemala, Kenya, and South Africa. For more information on production and trade, contact Erik Hansen at 202-720-0875. Also, please visit the tree nuts commodity page: <http://www.fas.usda.gov/htp/horticulture/nuts.html> for the latest information on almonds, walnuts, pistachios, hazelnuts, pecans, and macadamia nuts.*

## MACADAMIAS: Production, Supply, and Distribution in Selected Countries

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
<b>Metric Tons, In-Shell Basis</b>							
<b>Australia</b>							
1999/2000	4,100	34,000	0	38,100	18,100	16,000	4,000
2000/2001	4,000	34,300	0	38,300	26,000	9,000	3,300
2001/2002	3,300	37,000	0	40,300	27,300	9,250	3,750
2002/2003 F	3,750	38,850	0	42,600	28,850	9,500	4,250
<b>Costa Rica</b>							
1999/2000	530	2,000	0	2,530	1,681	300	549
2000/2001	549	2,000	0	2,549	1,900	330	319
2001/2002	319	2,100	0	2,419	1,900	340	179
2002/2003 F	NA	NA	NA	NA	NA	NA	NA
<b>Guatemala</b>							
1999/2000	110	4,000	0	4,110	3,800	200	110
2000/2001	110	7,200	0	7,310	7,000	200	110
2001/2002	110	9,360	0	9,470	9,000	360	110
2002/2003 F	110	9,800	0	9,910	9,500	360	50
<b>Kenya</b>							
1999/2000	700	6,000	0	6,700	6,429	61	210
2000/2001	210	4,900	0	5,110	3,924	156	1,030
2001/2002	1,030	5,800	0	6,830	6,052	89	689
2002/2003 F	689	6,050	0	6,739	6,339	100	300
<b>South Africa</b>							
1999/2000	530	8,000	0	8,530	7,710	520	300
2000/2001	300	9,700	0	10,000	9,200	500	300
2001/2002	300	11,000	0	11,300	10,400	500	400
2002/2003 F	400	12,000	0	12,400	11,400	600	400
<b>United States 2/ 3/ 4/</b>							
1999/2000	0	25,628	23,286	48,914	4,710	44,204	0
2000/2001	0	22,680	24,100	46,780	3,000	43,780	0
2001/2002	0	24,494	23,875	48,369	4,300	44,069	0
2002/2003 F	NA	NA	NA	NA	NA	NA	NA
<b>Total</b>							
1999/2000	5,970	79,628	23,286	108,884	42,430	61,285	5,169
2000/2001	5,169	80,480	24,100	110,049	51,024	53,966	5,059
2001/2002	5,059	87,054	23,875	118,688	58,952	54,608	5,128
2002/2003 F	NA	NA	NA	NA	NA	NA	NA

1/ Marketing Years: July-June for the United States; March-February for Australia, Brazil, and Kenya; January-December for Costa Rica, Guatemala, and South Africa.

2/ U.S. exports and imports come from the Bureau of the Census with forecasts by USDA/Foreign Agricultural Service (FAS) with shelling ratio averages of .224, .227, and .228 were for 1999/2000, 2000/2001, and 2001/02 respectively, based on averages of the past three years. Shelling ratios originate with the Hawaii Agricultural Statistics Service (HASS).

3/ U.S. exports include only prepared and preserved macadamia nuts. The National Agricultural Statistics Service (NASS) in Hawaii indicates that few U.S. exports are shelled or in-shell macadamias.

4/ Domestic consumption derived from production and exports

F = Forecast

SOURCES: FAS Agricultural Attaché Reports, Bureau of Census, NASS/USDA, and HASS

## U.S. Exports of Prepared and Preserved Macadamia Nuts 1/

	1996/1997	1997/1998	1998/1999	1999/2000	2000/2001
	(Metric Tons, In-Shell Equivalent)				
<b>Destination</b>					
Canada	338	343	403	589	687
China; Peoples Republic of	0	35	18	116	44
European Union	206	148	230	205	322
Hong Kong	535	730	128	397	163
Japan	2,882	1,400	2,190	2,299	2,507
Korea; Republic of	193	239	199	219	229
Lebanon	9	13	4	0	0
Norway	22	9	9	13	0
Philippines	22	0	13	22	93
Singapore	35	4	9	58	115
Switzerland	48	100	0	0	0
Taiwan	285	217	119	210	189
Other Countries	17	5	59	234	277
<b>Total</b>	<b>4,592</b>	<b>3,243</b>	<b>3,381</b>	<b>4,362</b>	<b>4,626</b>

## U.S. Imports of Prepared and Preserved Macadamia Nuts 1/

	1996/1997	1997/1998	1998/1999	1999/2000	2000/2001
	(Metric Tons, In-Shell Equivalent)				
<b>Destination</b>					
Australia	3,987	6,548	8,832	13,603	9,652
Brazil	461	687	549	670	1,683
China; Peoples Republic of	145	96	71	134	132
Costa Rica	1,421	1,713	739	1,196	1,079
El Salvador	1,583	870	1,996	2,112	1,917
Guatemala	1,439	1,496	947	768	93
Malawi	447	487	1,389	442	225
South Africa; Republic of	1,654	1,248	3,593	3,978	7,070
Zimbabwe	127	0	146	107	163
Other Countries	109	120	43	227	286
<b>Total</b>	<b>11,373</b>	<b>13,265</b>	<b>18,305</b>	<b>23,237</b>	<b>22,300</b>

1/ Marketing Years, July-June

NOTE: Shelling ratios for macadamia nuts are from the Hawaii Agricultural Service (HASS) and are shelling ratio averages of .224, and .227 were for 1999/2000, and 2000/2001 respectively, based on averages of the past three years. Shelling ratios originate with the Hawaii Agricultural Statistics Service (HASS).

Sources: U.S. Bureau of Census, HASS

## Phase Out of Methyl Bromide – Implications for U.S. Horticulture

*In 1987, more than 160 countries including the United States, signed an international treaty to globally phase out the use of substances that contribute to the depletion of the ozone layer. Among the compounds listed in the agreement, better known as the Montreal Protocol, is methyl bromide (MB), an agricultural fumigant that facilitates plant growth and the trade of agricultural commodities. Signatories to the treaty agreed to an incremental phase out of these substances; in developed countries the reduction is as follows: 25 percent in 1999, 50 percent in 2001, 70 percent in 2003 and 100 percent in 2005. Developing countries have until 2015 to reach 100-percent reduction.*

*To allow more time to develop alternatives and minimize the economic damage to industries dependent on methyl bromide, the Environmental Protection Agency (EPA), temporarily approved certain exemptions to permit the continued use of these compounds beyond the designated phase out dates. These exemptions include quarantine and preshipment use. Rulemaking guidelines for critical and emergency exemptions are also being developed.<sup>1</sup>*

### **Background**

Scientists over the years have discovered that the ozone layer has been slowly deteriorating, causing harmful ultra-violet rays from the sun to enter into the earth's atmosphere. One of the causes attributed to this deterioration is the use of ozone-depleting substances such as methyl bromide. In response to these findings, a group of countries signed an international treaty, entitled the Montreal Protocol, and agreed to stop using ozone-depleting substances.

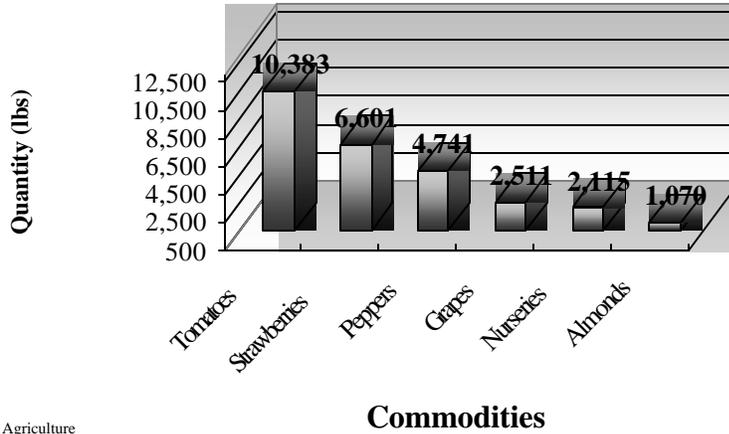
In the horticultural industry, methyl bromide (also known as bromomethane) is used as an agricultural fumigant to control the spread of pests such as insects, rodents, and nematodes. It is also used for soil fumigation before the planting of various fruits, vegetables, ornamentals, and agricultural nurseries; for post-harvest fumigation of commodities in storage and prior to shipment; and for government-required quarantine treatment to prevent the spread of regulated exotic pests.<sup>2</sup>

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<sup>1</sup> *Methyl Bromide Phase Out: <http://www.epa.gov>; Facing the Phase out of MB, ERS, February 2000*

<sup>2</sup> USDA Homepage: [www.usda.gov](http://www.usda.gov), methyl bromide

**Selected Users of Methyl Bromide in the Preplanting Process**



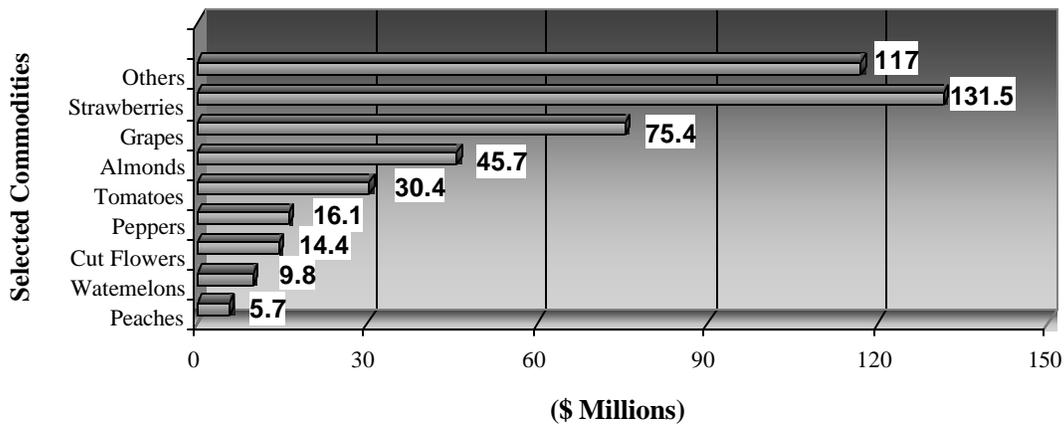
Source: U.S. Department of Agriculture  
Economic Research Service

**Economic Impact**

In light of the dependency that many horticultural growers have on methyl bromide and given the additional time developing countries will have in reducing their supplies of bromomethane, it is likely that the phase out of MB will place U.S. agricultural producers at a disadvantage when competing for export markets and could facilitate an increase of imports into the United States.

To assess the potential economic impact of the methyl bromide phase out on the U.S. horticultural industry, a study completed by the Economic Research Service and the National Center for Food and Agricultural Policy determined that the potential losses could reach \$446 million in the short term. The horticultural crops most affected by the phase out include tomatoes, strawberries, peppers, grapes, nurseries, and tree nuts.

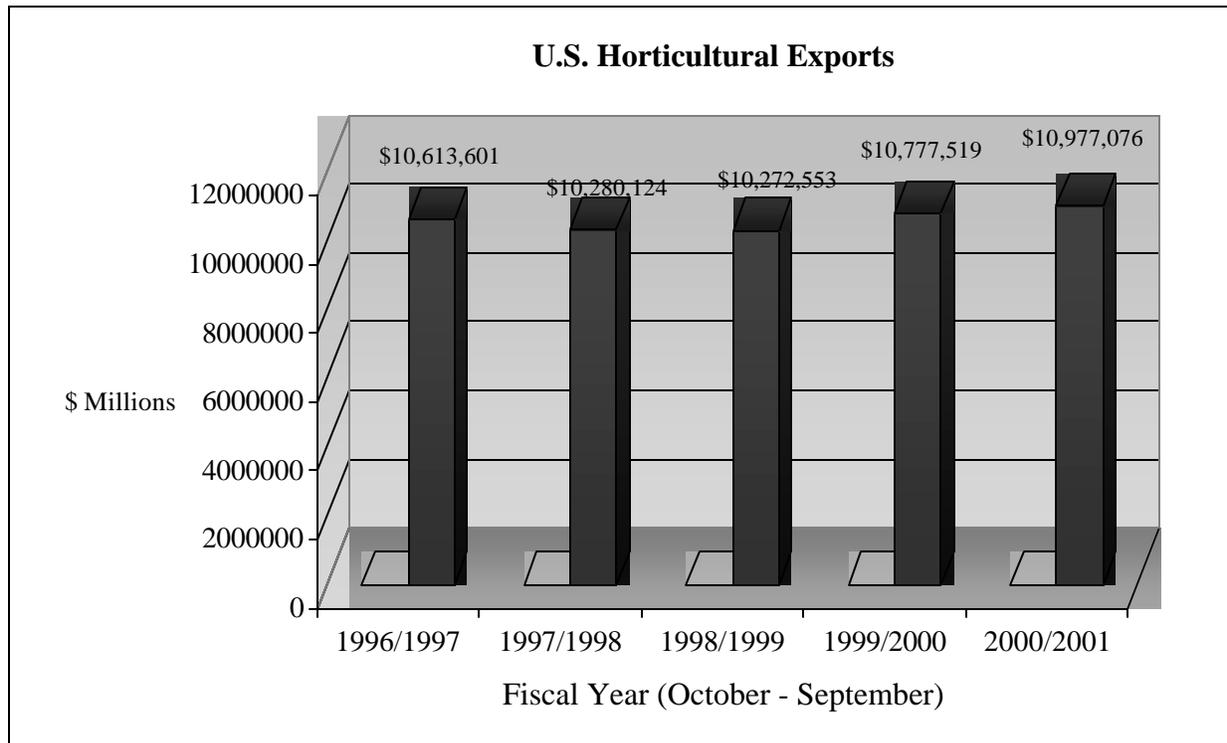
**Potential Short Term Economic Impact on the Methyl Bromide Phaseout for Selected Horticultural Products**



Source: U.S. Dept. of Agriculture, Economic Research Service

## Trade Implications

Without any viable alternative, the phase out of the agricultural fumigant could lower crop yields and severely impact the horticultural industry, which reached a record \$10.9 billion in exports in fiscal year (FY) 2001 (October 2000-September 2001). Separately, shipments of tree nuts totaled \$1.1 billion for the October-September 2000/01 period. Fresh fruit exports amounted to \$2.2 billion and fresh vegetable exports \$1.3 billion. Some of the fastest growing international horticultural shipments could also be affected; among them exports of apples registering \$416 million, grapes \$394 million, and dried plums \$152 million in FY 2001.



Source: U.S. Department of Commerce, Bureau of the Census

## Exemptions

### *Quarantine and Preshipment*

In response to concerns that U.S. enforcement of the methyl bromide phase out was more stringent than called for in the Montreal Protocol as well as trepidation that declining supplies could have a negative impact on the export and import of food products, the Environmental Protection Agency (EPA) announced several exemptions for the continued use of MB. The EPA, in July 2001, specifically announced an interim rule that exempts quarantine and preshipment applications of methyl bromide. Many governments require MB treatments to allow for the

import of agricultural commodities to prevent the spread of quarantine pests. These requirements are categorized under the quarantine exemption.

As defined in the Montreal Protocol, quarantine and preshipment applications exemptions are defined as follows:

- *“Quarantine applications are treatments to prevent the introduction, establishment, and/or spread of quarantine pests(including diseases), or to ensure their official control, where: (i) Official control is control performed or authorized by a national plant, animal or environmental protection, or health authority; (ii) quarantine pests are pests of potential importance to the areas endangered thereby and not yet present there, or, present but not widely distributed and being officially controlled.”*<sup>3</sup>
- *“Preshipment applications are those non-quarantine applications applied within 21 days prior to export to meet the official requirements of the importing country or existing official requirements of the exporting country. Official requirements are those which are performed by, or authorized by, a national plant, animal, environmental, health or stored product authority.”*<sup>4</sup>

To protect commodity trade from the adverse impacts of quarantine pest infestations and to ensure the safety of the supply of imported fruits and vegetables available to the general public, the EPA issued an interim final action to amend the accelerated phase out regulations that govern the production, import, export, transformation and destruction of methyl bromide, (MB) and other ozone-depleting substances. The amendment, in accordance with the Montreal Protocol, specifically creates a temporary exemption for the quarantine and preshipment treatments of methyl bromide through December 31, 2002. It also includes an exemption for purposes of compliance with APHIS requirements or with any international, federal, state or local sanitation or food protection standard as long as the applications are performed within 21 days prior to export. It also includes quarantine applications for interstate and inter-county treatments required to control quarantine pests. The EPA intends to announce a final rule that will delineate quarantine and preshipment exemptions before the end of year.<sup>5</sup> See the July 19, 2001 Federal Register, Part III, Environmental Protection Agency – 40 CFR Part 82 – Protection of Stratospheric Ozone: Process for Exempting Quarantine and Preshipment Applications of Methyl Bromide, Final Rule for additional details.

### ***Critical and Emergency Use***

In addition to the quarantine and preshipment exemptions, the EPA has been meeting with stakeholders in developing a criteria for establishing critical use applications. It will also initiate a rulemaking process that will delineate the use of methyl bromide for critical and emergency

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<sup>3</sup> Westlaw, March 2002

<sup>4</sup> Westlaw, March 2002

<sup>5</sup> Federal Register July 2001, Westlaw, March 2002

treatments beyond the January 1, 2005 deadline. Exceptions for critical use will allow the use of MB in the following circumstances:

- *There are no technically and economically feasible alternatives or substitutes available to the user that are acceptable from the standpoint of environment and health and are suitable to the crops and circumstances of the nomination;*
- *All technically and economically feasible steps have been taken to minimize the critical use and any associated emission of methyl bromide;*
- *It is demonstrated that an appropriate effort is being made to evaluate, commercialize and secure national regulatory approval of alternatives and substitutes;*
- *The specific use is critical because the lack of availability of methyl bromide for that use would result in a significant market disruption; and*
- *Methyl bromide is not available in sufficient quantity and quality from existing stocks of banked or recycled methyl bromide, also bearing in mind the developing countries' need for methyl bromide;*

Emergency uses will allow a country to use up to 20 tons of MB in cases of pest outbreaks or infestations.

The Environmental Protection Agency is expected to issue a Federal Register notice sometime in 2002, soliciting public input to develop rules that will define critical and emergency use exemptions.

***(For further information, contact Rey Santella at 202-720-0897. Also, visit the HTP web page at: <http://www.fas.usda.gov>)***

## EU CAP Enlargement: The Commissions Proposal

**On January 30, 2002, the European Commission presented its proposal for extending the Common Agricultural Policy to ten Eastern and Central European countries. The proposal, which includes specific budgetary allotments per candidate, will be discussed by member states.**

In 2004, ten countries are expected to join the fifteen countries currently comprising the European Union. The ten candidates are Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia. Key points in the Commission's proposal include a ten-year transition period for direct payments combined with a substantial amount of funding for rural development measures. New member countries, which are already providing direct aids to farmers, will be able to supplement EU payments with national funds. For the new member countries, the payment would be phased in over ten years, starting at 25 percent of the EU level in the first year, 2004/05. The payment would then increase five percent per year for the next three years. The payment would increase gradually for the next six years

The Commission's proposal will be debated in the Council, which is expected to decide on a Common Position by June 2002. Only then can negotiations with the candidate countries begin. Due to the highly political nature of the budgetary questions, the negotiations on agriculture are expected to last into December. Once negotiations are complete, the European Parliament has the right to assent or dissent to the accession treaty as a whole (they may not propose amendments) and member states as well as accession candidates must also ratify the treaty according to their procedures. If negotiations are completed by the end of 2002, accession could likely take place by 2004, as currently anticipated.

The Commission proposes to use data from 1995-1999 to establish supply management instruments such as production quotas, arable crop base areas and beef premium ceilings. The most appropriate reference period for each type of scheme would be chosen within this framework. While the Commission proposal includes specific quota amounts, and other instruments per accession candidate, the final negotiated amounts are expected to be highly controversial and political and are not likely to be decided until the end of the negotiations in December 2002.

The Commission proposal suggests increasing current Community Thresholds for aid for processing to account for the new member states.

## Processed Fruits and Vegetables

Current Community thresholds for the products in question are as follows (in tons):

	Tomatoes	Peaches	Pears	Oranges	Lemons	Sm. Citrus	Grapefruit
Threshold	8,251,455	539,006	104,378	1,500,236	510,600	384,000	6,000

Proposed increase for Community thresholds (\*\* means insufficient/unsuitable data provided)

Country/product	Requested increase	Average Historical Production '97-'99	Proposed increase
Cyprus			
-Tomatoes	10,000	4,641	4,770
-Peaches	500	**	**
-Pears	500	0	0
-Lemons	5,000	3,548	2,986
-Grapefruit	30,000	9,069	10,812
-Oranges	21,000	15,438	14,969
-Small citrus	10,000	1,007	937
Czech Republic			
-Tomatoes	26,000	**	**
-Peaches	4,000	**	**
-Pears	500	**	**
Hungary			
-Tomatoes	321,442	127,265	130,790
-Peaches	1,000	11,692	13,808
-Pears	1,000	**	**
Malta			
-Tomatoes	50,000	**	**
Slovakia			
-Tomatoes	36,000	**	**

**EU Horticultural Trade with Enlargement Candidate Countries**

**EU Horticultural Trade with Enlargement Candidate Countries**

	EU Horticultural Exports			EU Horticultural Imports			Net EU Horticultural Trade		
	1000 U.S. Dollars			1000 U.S. Dollars			1000 U.S. Dollars		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
<b>Live Plants, Cut Flowers</b>	\$178,035	\$193,331	\$181,579	\$39,581	\$41,995	\$41,757	\$138,454	\$151,336	\$139,822
<b>Fresh &amp; Frozen Vegetables</b>	\$293,065	\$255,974	\$250,173	\$297,710	\$295,978	\$261,828	(\$4,645)	(\$40,003)	(\$11,656)
<b>Fresh &amp; Frozen Fruits &amp; Nuts</b>	\$497,869	\$507,946	\$533,327	\$431,095	\$399,860	\$361,410	\$66,774	\$108,086	\$171,917
<b>Sugar</b>	\$209,829	\$151,135	\$146,648	\$79,236	\$73,589	\$71,910	\$130,592	\$77,546	\$74,738
<b>Prepared Fruits &amp; Vegetables</b>	\$223,453	\$178,203	\$165,791	\$232,486	\$251,486	\$275,612	(\$9,033)	(\$73,283)	(\$109,822)
<b>Beverages; Wine, Beer</b>	\$347,456	\$352,379	\$331,279	\$163,809	\$176,219	\$200,986	\$183,647	\$176,160	\$130,293
<b>Total</b>	\$1,749,707	\$1,638,969	\$1,608,797	\$1,243,918	\$1,239,127	\$1,213,504	\$505,789	\$399,842	\$395,293

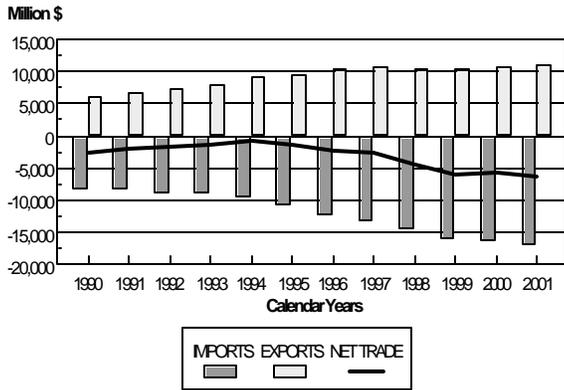
	EU Horticultural Exports			EU Horticultural Imports			Net EU Horticultural Trade		
	1000 U.S. Dollars			1000 U.S. Dollars			1000 U.S. Dollars		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
<b>Poland</b>	\$539,454	\$538,345	\$559,784	\$607,234	\$599,976	\$614,229	(\$67,780)	(\$61,631)	(\$54,445)
<b>Czech Republic</b>	\$369,054	\$372,917	\$345,259	\$107,523	\$128,557	\$158,109	\$261,531	\$244,361	\$187,150
<b>Hungary</b>	\$143,782	\$127,016	\$137,597	\$345,301	\$342,162	\$302,058	(\$201,519)	(\$215,146)	(\$164,461)
<b>Slovenia</b>	\$155,486	\$144,027	\$126,133	\$23,664	\$23,380	\$19,187	\$131,822	\$120,647	\$106,946
<b>Slovakia</b>	\$114,352	\$103,063	\$94,236	\$13,507	\$12,761	\$15,353	\$100,845	\$90,302	\$78,883
<b>Estonia</b>	\$118,632	\$87,746	\$91,783	\$10,594	\$7,171	\$6,031	\$108,037	\$80,575	\$85,752
<b>Latvia</b>	\$95,691	\$70,858	\$73,008	\$5,942	\$3,736	\$4,829	\$89,749	\$67,123	\$68,179
<b>Cyprus</b>	\$70,102	\$68,102	\$68,145	\$100,385	\$101,237	\$73,064	(\$30,283)	(\$33,135)	(\$4,919)
<b>Lithuania</b>	\$80,971	\$62,157	\$57,488	\$25,263	\$16,325	\$17,335	\$55,708	\$45,833	\$40,153
<b>Malta</b>	\$62,183	\$64,735	\$55,363	\$4,506	\$3,824	\$3,307	\$57,678	\$60,911	\$52,056
<b>Total</b>	\$1,749,707	\$1,638,969	\$1,608,797	\$1,243,918	\$1,239,127	\$1,213,504	\$505,789	\$399,842	\$395,293

Source: Eurostat

Information for this report was prepared by Christine Strossman, USEU Brussels, 011-32-2508-2760 and Robert Knapp, Horticultural and Tropical Products Division, 202-720-4620. For further information download Report #22014 dated 2/5/02 from the FAS

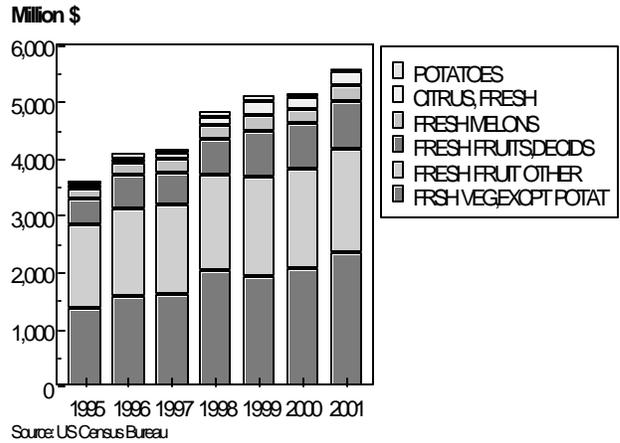
# U.S. Horticultural Import Trends

## U.S. Horticultural Trade Continues to Expand

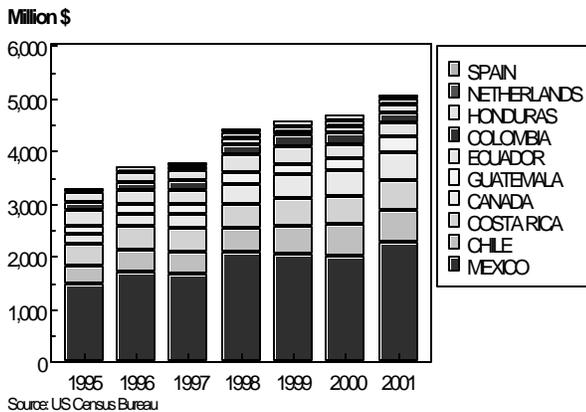


Includes: fresh & processed fruits, vegetables, tree nuts, nursery products, flowers, wine, beer, juices, miscellaneous products

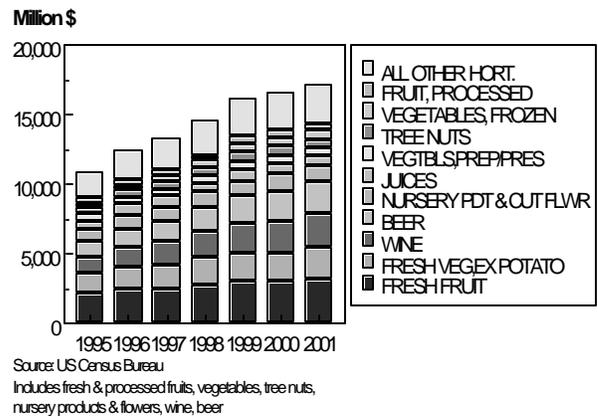
## U.S. Imports of Fresh Fruits and Vegetables



## U.S. Imports of Fresh Fruits & Vegetables - Key Suppliers



## U.S. Imports of Horticultural Products



# U.S. Horticultural Import Trends

## U.S. HORTICULTURAL IMPORTS - OVERVIEW

- Over the period 1991-2001, **U.S. imports of horticultural products more than doubled** (from \$8.6 billion to \$17.2 billion). In contrast, U.S. exports of horticultural products over the same period expanded by 66 percent (rising from \$6.6 billion to \$11 billion).
- **Import penetration in the U.S. fruit and vegetable industry has increased significantly** in recent years. **Imports of fresh fruit** excluding melons, but including bananas **rose** from 34.7 percent of fresh domestic consumption in 1990 **to 42 percent in 2000**. Excluding bananas and melons, imports of fresh fruit rose from 11.6 percent to 19 percent of fresh domestic consumption during the same period.
- Tropical fruit consumption has been rising significantly at the same time as domestic production has been falling. In this regard, Mexico supplies almost all of the mangos, papayas, and limes consumed in the United States. (ERS data)
- **Imports of fresh vegetables and melons rose** from 6.9 percent of fresh domestic consumption in 1990 **to 13.6 percent in 2000**.
- Most imports of horticultural products (with some notable exceptions, such as EU wine and India cashews) are sourced from Western Hemisphere suppliers, most notably the NAFTA partners of Mexico and Canada.

## KEY FACTORS BEHIND THE RISE IN IMPORTS

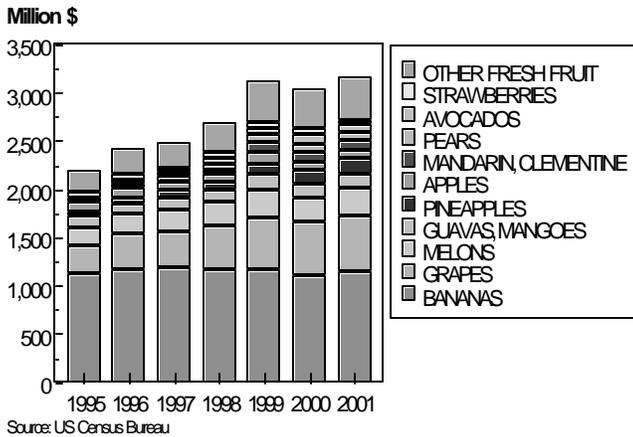
- **Relatively open U.S. import regime** (U.S. agricultural tariffs average 12 percent compared with the global average of 62 percent)
- The **strong dollar** (the nominal trade-weighted value of the dollar against major currencies rose 20 percent from 1991 to 2001, (Federal Reserve))
- The U.S. **population** grew from about 253 million in 1991 to 280 million in 2001.
- U.S. **GDP per capita rose** from \$24,000 in 1991 to about \$35,000 in 2001.
- Evolving consumer preferences, including, for example, increased demand for year-round availability of fresh fruits and vegetables. Total per capita **use of fruits and vegetables rose 19 percent from 1982 to 1997** (ERS data on 129 products)
- Increased **consumer awareness** of the role that fruits and vegetables play in a healthy diet (e.g., 5-a-Day for Better Health).
- Supermarkets now carry over 400 produce items compared with 250 in the late 1980's.
- Increased consumption of wine for health and social reasons.

## BENEFITS OF FURTHER TRADE LIBERALIZATION

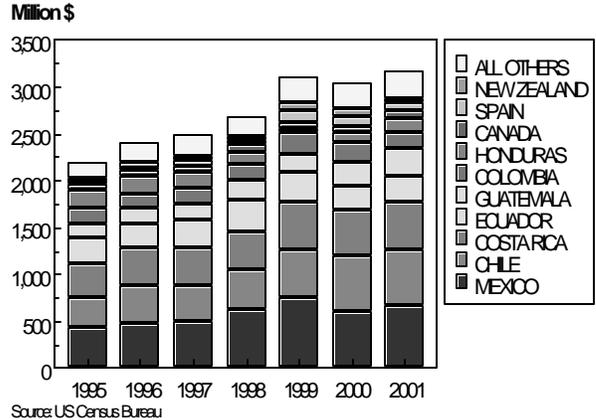
- Despite the growing trade imbalance, the United States would benefit from lower trade barriers through new and expanded export opportunities for its growers, processors and exporters.
- A more open world trade regime would serve to increase world access to other key markets, lessening reliance by foreign suppliers on the U.S. market, which can be seen within the current global trading environment as essentially being "the only game in town."
- U.S. exports of horticultural products are destined primarily to countries outside of the FTAA. Negotiations to lower tariff barriers in these countries would create substantial growth opportunities for U.S. exports.

# U.S. Horticultural Import Trends

## U.S. Imports of Fresh Fruits



## U.S. Imports of Fresh Fruits - Key Suppliers



### FRUIT IMPORT HIGHLIGHTS

- **Temperate fruit imports have grown considerably**, particularly grapes and melons. However, **imports of these products follow a highly seasonal pattern**, with imports peaking in the late fall through early spring and dropping to very low levels during June through October. These imports generally complement the U.S. marketing season for these fruits.
- **Latin America is the primary supplier of fresh and frozen fruit**, while Southeast Asian countries are the lead suppliers of canned fruit.
- **Chile and Mexico** accounted for **34 percent and 30 percent** of U.S. import value of temperate fruits, respectively in 2000.
- **Grapes: imports have grown 82 percent** during the 1995-2000 period. Despite the fact that most grape imports are during the off-season for U.S. grapes, there is substantial overlap between imports and domestically produced grapes during the U.S. marketing season. (Chile is the predominant supplier, followed by Mexico.)

### FRUIT IMPORT HIGHLIGHTS

Continued

- **Grapes: imports have grown 82 percent** during the 1995-2000 period. Despite the fact that most grape imports are during the off-season for U.S. grapes, there is substantial overlap between imports and domestically produced grapes during the U.S. marketing season. (Chile is the predominant supplier, followed by Mexico.)
- **Melons: Imports have grown 35 percent** during the 1995-2000 period. Despite the seasonality of imports, there is substantial competition between imports and domestically produced melons during the U.S. marketing season. Growing consumption has outpaced growing production of melons. (Mexico is the predominant supplier, followed by Central American countries.)
- **Citrus: Imports of fresh mandarins and clementines have grown from \$18 million in 1995 to \$109 million in 2000**, peaking during the months of Nov.-Jan. in competition with U.S. citrus. Spain, the predominant supplier, now faces an import ban, following the detection of fruit fly larvae in recent shipments.

# U.S. Horticultural Import Trends

## VEGETABLE IMPORT HIGHLIGHTS

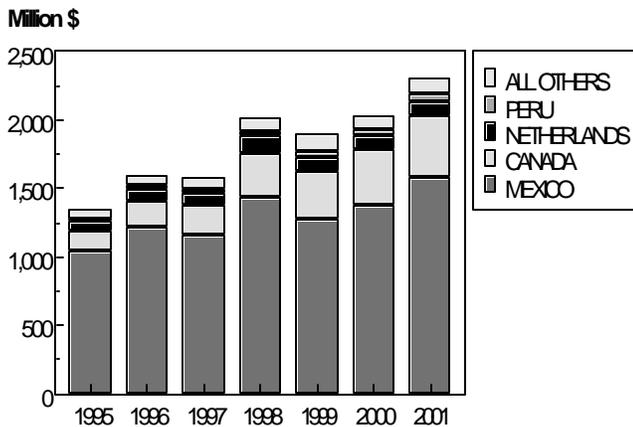
- Imports of fresh vegetables have grown considerably, particularly peppers (up 88 percent), cucumbers (up 53 percent), squash (up 53 percent), and asparagus (up 91 percent). Imports are highly seasonal, with two-thirds arriving between December and April, when U.S. production is limited. Most of these are warm season crops, including tomatoes, peppers, squash, and cucumbers.
- Vegetable imports are dominated by Mexico, with an average 69 percent share, followed by Canada, with a 15 percent share, and the Netherlands, with a 5 percent share.
- Tomatoes: Imports rose from \$451 million in 1995 to \$758 million in 1998, but dropped to \$640 in 2000. A high percentage of tomato imports compete head-to-head with U.S. product, leading to significant trade disputes. Mexico is by far the largest supplier, but Canada and the Netherlands have entered the market in recent years.

## VEGETABLE IMPORT HIGHLIGHTS

Continued

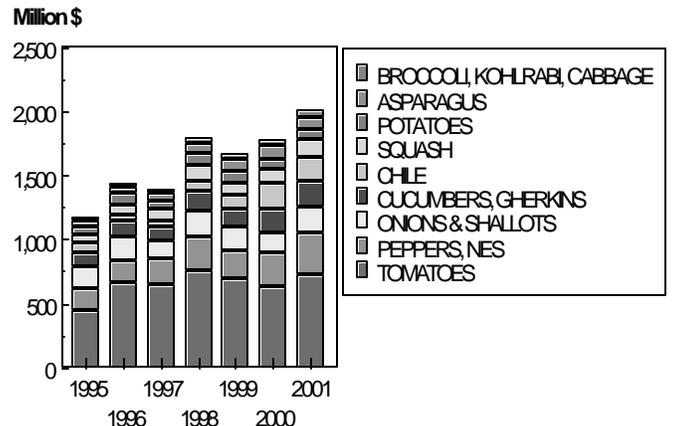
- Peppers: Imports rose from \$242 million in 1995 to \$456 million in 2000, accounting for a growing share of domestic consumption. Mexico is the predominant supplier, followed by Canada and the Netherlands. Imports from Mexico have accounted for almost all of the phenomenal growth. Imports peak in the winter before the U.S. marketing season begins in July.
- Squash: Imports almost doubled from 1995 to 2000, increasing in value from \$73 million to \$113 million, of which Mexico accounted for almost 99 percent of imports in 2000.
- Asparagus: Imports of fresh asparagus have grown from \$60 million in 1995 to \$115 million in 2000, as U.S. fresh consumption has grown from about 70,000 tons to close to 120,000 tons. Almost 95 percent of imports take place during the off-season. Mexico and Peru are the predominant suppliers.

## U.S. Imports of Fresh Vegetables - Key Suppliers



Source: US Census Bureau  
Includes: All fresh vegetables except legumes

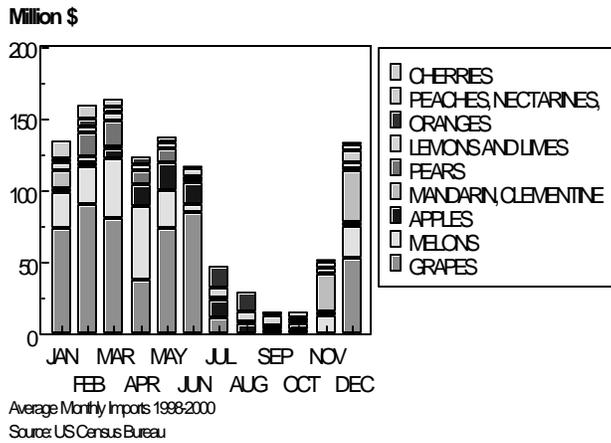
## U.S. Imports of Selected Fresh Vegetables



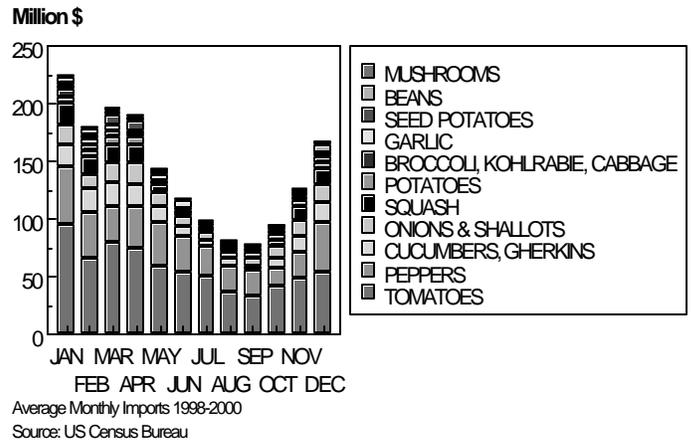
Source: US Census Bureau

# U.S. Horticultural Import Trends

## Monthly U.S. Imports of Selected Fresh Fruit



## Monthly U.S. Imports of Selected Fresh Vegetables



## **World Trade Situation and Policy Updates**

### **Australia Approves California Grape Imports**

On February 14, 2002, the Australian Ministry of Agriculture approved entry of California table grapes, but under strict conditions, which include fumigation-at-origin. The final recommendation was based on an extensive import risk analysis that was completed by Australia on California table grapes over the past few years. In fact, USDA and USTR have worked, in cooperation with the industry, for more than ten years to obtain table grape access to the Australian market for California grapes. USDA will continue to work with the grape industry and the Australians to reassess the program at the end of the first shipping season with a view towards modifying some of the requirements, such as, for example, allowing for upon-arrival fumigation.

### **Commerce Department Issues Final Dumping Margins on Canadian Hothouse Tomatoes**

On February 20, 2002, the Commerce Department's International Trade Administration (ITA) issued its final determination on dumping margins in the case against Canadian hothouse tomatoes. Dumping margins ranged from 1.53 percent to 18.21 percent, considerably less than the preliminary duties that had ranged from zero to 33.95 percent. While ITA trimmed the dumping margins for most major operations, they increased the margins for one major Ontario-based firm from 5.54 percent to 14.89 percent. The U.S. International Trade Commission is scheduled to release its final determination on the issue of injury on April 1. U.S. imports of greenhouse tomatoes from Canada in 2001 were valued at \$96 million, up 23 percent from 2000.

### **Korea Fulfills 2002 Minimum Market Access (MMA) Orange Quota**

According to FAS/Seoul, the Cheju Citrus Growers Agricultural Cooperative (CCGAC) held a quota auction for 43,751 tons of fresh oranges and 1,910 tons of other citrus on February 20, 2002. Allocations totaling 43,740 tons of fresh oranges and 100 tons of other citrus were sold during this auction, effectively satisfying Korea's 2002 Uruguay Round MMA quota commitment. The auction occurred after the peak marketing season for Korea's domestic orange production and deliveries of quota imports must be completed before September 30, prior to the new domestic season. Under Korea's import regime, oranges may enter within the quota at a tariff of 50 percent, or outside the quota at a 2002 duty rate of 59.8 percent. The out-of-quota duty is being phased down until it reaches the in-quota rate of 50 percent in 2004. As the out-of-quota duties have declined, U.S. orange exports to Korea out-of-quota have jumped sharply, exceeding the in-quota volumes for each of the past two years. Whereas CCGAC had fallen short of filling the quota through direct administration in recent years, the recent quota auction served as an effective means for the entity to satisfy its MMA obligations under the prevailing market conditions. Korea has emerged as a leading market for U.S. oranges, with shipments in calendar year 2001 totaling \$49 million, up 25 percent from the previous year.

## **Cuba to Buy U.S. Apples**

On March 8, 2002, FAS learned of Cuba's intention to buy 1,000 tons of Washington state apples, which could be worth about \$500,000. Reportedly, the Cuban import agency Alimport, wants to purchase medium-to-large red delicious apples, and consultations on price and quality are underway. The sales, to be paid in cash, are expected to be completed in May or June 2002. U.S. exports of agricultural products to Cuba, Iran, Libya, North Korea, and Sudan are now possible under the Trade Sanctions Reform Act, which was signed into law in October 2000. In July 2001, after an extensive consultative process, final regulations lifting food and medicine sales to these countries were approved. Initial sales to Cuba occurred in December 2001, with total announced agricultural purchases reaching \$77 million. In mid-January 2002, a Washington state agricultural trade mission visited Cuba as part of the state's efforts to expand its exports of agricultural products.

## **Judge Rules Against the Florida Department of Citrus (FDOC) in Florida's Equalizing Tax Case**

On March 15, 2002, the 10<sup>th</sup> Judicial Circuit Court in Florida ruled that Florida's equalization tax is unconstitutional because it allows citrus juice from other U.S. states to be exempt. In related developments, the Florida Senate approved an amendment to the general appropriations bill that would repeal the tax exemption. On March 20, 2002, Brazil requested formal WTO consultations on Florida's equalizing tax. Brazil is expected to argue that as citrus products originating from other states such as Texas, Arizona, and California are not assessed, the tax discriminates against imports.

## **EU Parliament Adopts Resolution to Seek WTO Solution to U.S. Ban on Spanish Clementines**

On March 14, 2002, the EU Parliament, in a 92 to 1 vote, adopted a joint resolution condemning U.S. trading practices and establishing a strategy that should be adopted to put an end to the ban on U.S. imports of Spanish clementines. The resolution urges the EU Commission to "engage in a procedure at the WTO against the United States should an immediate solution not be found." It considers this dispute as a "trade barrier, not as a plant health issue." The resolution claims the ban has a goal to "exclude Community clementines from the American market to the benefit of its own production of citrus fruit and that of other third countries."

## **Export News and Opportunities**

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. In FY 2002, USDA has made available over \$5 billion in credit guarantees to facilitate sales to selected developing countries, Western Europe, Japan, Hong Kong, and Taiwan. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. USDA does not provide financing, but it guarantees payments due to U.S. exporters in case the foreign banks or importers default.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

**<http://www.fas.usda.gov/export.html>**

### **GSM-102**

On March 11, USDA extended the GSM-102 program to Azerbaijan. USDA authorized \$5 million in credit guarantees for sales of U.S. agricultural commodities to Azerbaijan under the GSM-102. The FAS announcement pertinent to this allocation is PR-0266-01. Exporters may apply for credit guarantees on a first-come, first-served basis to cover sales of eligible commodities to Azerbaijan.

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with

USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

### **Supplier Credit Guarantee Program**

On March 11, USDA for the first time has authorized \$5 million in supplier credit guarantees for sales of U.S. agricultural commodities to Azerbaijan. The FAS announcement pertinent to this allocation is PR-0081-02. Exporters may apply for credit guarantees on a first-come, first-served basis to cover sales of eligible commodities to Azerbaijan.

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

### **GSM-102 and SCGP**

The following tables present the FY 2002 GSM-102 and SCCP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

*(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911 or Rochelle Foster on 202-720-2936).*

## FY 2002 SCGP COVERAGE

Country	Commodity	Announced Allocations	Exporter Applications Received	Balance
		--coverage in millions of dollars--		
Algeria		10.00	0.00	10.00
Baltic Region		20.00	0.00	20.00
Caribbean Region		10.00	1.41	8.59
	Wine (180)		0.01	
Central America Region		50.00	20.60	29.40
	Fruit, Fresh (180)		0.20	
Central Europe Region		20.00	0.00	20.00
China/Hong Kong Region		50.00	0.01	49.99
	Wine (180)		0.01	
Egypt		20.00	7.35	12.65
India		25.00	0.00	25.00
Israel		20.00	0.00	20.00
Japan		50.00	0.00	50.00
Kazakhstan		15.00	2.00	13.00
Kenya		2.00	0.00	2.00
Korea		50.00	4.78	45.22
	Fruit, Canned (180)		0.15	
	Fruit, Fresh (180)		4.60	
	Wine (180)		0.03	
Mexico		100.00	99.97	0.03
	Fruit, Fresh (180)		0.03	
	Wine (180)		0.03	
Poland		10.00	0.05	9.95
Russia		20.00	1.81	18.19
	Fruit, Fresh (180)		0.01	
South Africa		10.00	0.00	10.00
South America Region		20.00	1.29	18.71
Southeast Asia Region		150.00	57.92	92.08
	Fruit, Fresh (180)		0.20	
	Fruit Juice (180)		0.01	
	Fruit Juice Concentrates (180)		0.01	
	Wine (180)		0.01	
Southeast Balkans Region		75.00	0.30	74.70
Southeast Europe Region		20.00	0.00	20.00
Sri Lanka		10.00	0.00	10.00
Taiwan		50.00	0.01	49.99
	Wine (180)		0.01	
Turkey		10.00	0.00	10.00
West Africa Region		35.00	5.90	29.10
Western Europe Region		50.00	0.08	49.92
	Wine (180)		0.07	
Yemen		10.00	0.00	10.00

## FY 2002 GSM-102 COVERAGE

Country	Announced Allocations --coverage in millions of dollars--
Algeria	50.00
Baltic Region	15.00
Bulgaria	7.00
Caribbean Region	220.00
Central America Region	250.00
Central Europe Region	10.00
China/Hong Kong Region	300.00
Dominican Republic	25.00
East Africa	5.00
Egypt	100.00
India	25.00
Jordan	10.00
Kazakhstan	10.00
Korea	330.00
Lebanon	10.00
Malaysia	30.00
Mexico	500.00
Morocco	10.00
Nigeria	10.00
Philippines	100.00
Poland	25.00
Romania	25.00
Russia	20.00
South America Region	600.00
Southeast Asia Region	190.00
Southeast Europe Region	25.00
Southern Africa Region	50.00
Sri Lanka	35.00
Thailand	100.00
Tunisia	20.00
Turkey	345.00
West Africa Region	14.00

**Top United States Horticultural Product Exports By Value**

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Jan.	Oct. -Jan.
						FY 2001	FY 2002
--- 1,000 Dollars ---							
Almonds	879,032	772,891	696,818	580,815	682,680	295,235	311,721
Essential Oils	622,219	532,623	507,651	591,583	674,715	197,152	213,803
Wine & Wine Prdts.	390,376	510,923	545,287	538,143	548,601	173,114	153,498
Fresh Apples	412,855	328,068	375,869	336,444	414,227	163,950	145,552
Fresh Grapes	313,836	274,953	283,865	332,162	390,322	187,294	188,278
Frz. Potato Fries	294,417	313,209	343,216	339,553	359,945	121,055	111,854
Oranges	308,055	339,114	159,585	268,808	304,406	74,919	73,764
Orange Juice All	305,172	295,564	307,165	290,395	251,043	88,329	71,871
Proc. Tomatoes	229,526	233,209	220,380	221,306	227,506	78,082	79,089
Nursery Products	185,316	220,055	229,737	216,722	215,261	80,794	66,475
Fresh Lettuce	146,640	173,746	157,262	180,099	201,531	73,587	71,899
Grapefruit	240,408	189,744	221,443	208,329	200,273	77,682	76,675
Beer	341,784	280,088	211,861	177,241	199,782	53,957	49,759
Potato Chips	145,468	226,987	257,355	243,824	182,895	72,502	60,395
Walnuts	195,209	153,863	154,449	149,315	175,541	109,406	115,033
Fresh Cherries	140,650	113,556	154,793	169,516	159,885	1,416	1,100
Prunes	138,398	133,732	133,885	131,697	151,664	55,577	51,617
Fresh Tomatoes	123,789	122,345	127,153	148,312	150,990	55,695	51,227
Raisins	204,388	199,733	198,817	145,861	150,869	56,008	50,105
Proc. Sweet Corn	167,490	139,068	148,050	146,591	120,893	43,674	45,590
Total Other	4,838,913	4,765,679	4,864,543	5,121,136	5,296,828	1,733,617	1,738,847
<b>GRAND TOTAL</b>	<b>10,623,941</b>	<b>10,319,150</b>	<b>10,299,184</b>	<b>10,537,852</b>	<b>11,059,857</b>	<b>3,793,045</b>	<b>3,728,152</b>

**Top United States Horticultural Product Exports By Volume**

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Jan.	Oct. -Jan.
						FY 2001	FY 2002
Fresh Apples	690,595	539,685	664,969	571,860	742,377	300,991	249,703
Oranges	569,739	609,433	247,419	490,867	541,338	143,192	115,386
Frz. Potato Fries	396,738	438,425	468,826	469,287	505,641	171,118	159,337
Orange Juice All	565,332	553,175	554,951	550,888	464,112	147,179	122,153
Grapefruit	484,417	387,216	428,784	390,958	390,498	152,116	151,044
Fresh Onions	265,859	292,328	257,089	333,775	357,427	179,642	137,233
Fresh Lettuce	294,571	303,816	312,563	328,600	350,247	126,636	127,150
Wine & Wine Prdts.	208,786	266,294	274,696	281,475	311,924	99,787	84,963
Fresh Grapes	236,400	214,569	221,158	272,901	303,583	143,319	140,279
Beer	536,362	425,523	330,158	278,522	300,673	79,945	73,696
Proc. Tomatoes	293,112	300,327	264,369	277,277	297,129	102,729	103,000
Almonds	187,953	202,968	200,847	220,099	258,543	106,394	132,940
Fresh Melons	219,695	211,310	247,448	250,860	234,887	34,751	33,271
Fresh Tomatoes	153,657	133,687	148,271	181,892	173,470	53,684	59,729
Pears	126,603	156,807	145,816	162,629	158,199	77,424	92,121
Fresh Broccoli	130,999	126,791	154,514	182,848	157,465	43,363	39,708
Proc. Sweet Corn	203,613	171,294	186,153	187,818	150,891	56,240	51,295
Peaches	103,442	80,023	97,974	113,098	129,221	9,441	13,687
Lemons	120,330	113,392	113,931	106,249	110,507	41,705	41,669
Raisins	115,215	120,741	104,225	83,832	109,877	39,417	37,053

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

### Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Jan.	Oct. -Jan.
						FY 2001	FY 2002
--- 1,000 Dollars ---							
Beer	1,443,326	1,677,002	1,865,038	2,126,018	2,296,135	651,317	699,745
Wine & Wine Prdts.	1,629,254	1,829,709	2,150,057	2,271,185	2,283,829	823,931	865,327
Bananas & Plantns	1,194,458	1,188,442	1,180,227	1,098,409	1,125,986	356,354	376,241
Nursery Products	565,267	632,672	673,194	745,977	789,101	265,242	262,395
Fresh Tomatoes	611,612	735,180	713,121	608,428	755,045	265,610	168,688
Fresh Grapes	386,183	440,659	545,409	518,260	581,556	175,682	188,475
Cut Flowers	572,926	630,067	578,766	623,213	577,418	185,370	172,709
Fresh Peppers	251,908	343,606	324,880	451,848	507,988	143,232	136,066
Cashews	292,315	339,490	390,111	487,687	366,689	130,033	129,800
Frz. Potato Fries	156,831	216,576	252,437	321,914	338,228	111,114	129,724
Essential Oils	322,447	350,086	315,861	309,570	300,590	102,710	112,123
Fresh Melons	226,502	250,921	277,880	259,797	285,704	96,155	81,025
All Apple Juices	354,632	228,735	210,263	278,975	230,406	76,200	83,181
Olives	184,217	181,730	200,293	184,928	204,810	67,301	66,502
Fresh Cucumbers	100,823	154,634	138,241	168,771	200,549	66,736	70,835
All Orange Juices	240,072	211,353	285,947	243,298	185,093	57,782	41,629
Fresh Onions	127,447	151,990	135,574	131,705	168,116	66,519	62,493
Fresh Mangos	123,009	125,047	138,823	142,010	152,116	23,471	31,149
Fresh Pineapple	74,441	83,676	121,679	117,539	151,753	50,713	50,949
Total Other	4,222,577	4,604,941	5,368,446	5,315,151	5,524,521	1,968,105	2,116,848
<b>GRAND TOTAL</b>	<b>13,080,247</b>	<b>14,376,516</b>	<b>15,866,247</b>	<b>16,404,683</b>	<b>17,025,633</b>	<b>5,683,577</b>	<b>5,845,904</b>

1/ Nursery Products excludes cut flowers.

### United States Top Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Jan.	Oct. -Jan.
						FY 2001	FY 2002
Beer	1,612,379	1,869,577	2,072,394	2,290,532	2,490,735	698,504	760,241
Wine & Wine Prdts.	432,192	428,664	420,152	481,164	510,730	174,104	194,239
Bananas & Plantns	3,911,294	4,135,832	4,369,283	4,350,838	4,046,727	1,349,358	1,336,264
Nursery Products	2,206,085	2,460,306	2,765,772	2,860,569	2,926,298	963,470	952,582
Fresh Tomatoes	743,205	856,852	722,591	708,690	868,118	273,849	162,800
Fresh Grapes	857	1,039	978	1,185	1,061	303	291
Cut Flowers	2,770,092	2,770,186	2,707,948	2,804,568	2,642,134	887,533	881,530
Fresh Peppers	284,221	319,671	345,444	352,169	346,518	112,628	134,994
Frz. Potato Fries	269,794	353,931	397,455	470,605	519,751	167,085	204,843
Fresh Melons	779,005	860,437	873,032	898,995	878,214	300,613	270,861
All Apple Juices	1,084,986	1,016,823	1,140,355	1,171,502	1,230,760	353,842	478,559
Fresh Cucumbers	302,306	327,745	336,045	346,863	373,596	156,336	154,772
All Orange Juices	1,116,798	1,063,239	1,326,231	1,284,749	976,227	338,867	235,247
Fresh Onions	261,088	259,188	246,532	224,080	269,156	90,881	109,532
Fresh Mangos	191,115	188,767	212,992	231,078	229,492	33,453	46,576
Fresh Pineapple	171,253	255,533	272,601	304,207	333,476	118,808	102,560
Fresh Squash	141,192	157,537	151,916	156,520	168,099	75,757	81,377
Frozen Broccoli	169,458	153,962	186,187	164,090	168,988	67,023	65,986
Fresh Apples	168,564	156,700	158,550	170,490	156,593	19,369	20,618

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.

### Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic Units	2001	2001	2002	% Change	% Change
		Feb	Jan	Feb/1	Last Month	Last Year
Dollars/unit						
Grapefruit 2/	Box	2.24	1.98	1.7	-14.1%	-24.1%
Lemons 2/	Box	0.5	8.17	6.64	-18.7%	1228.0%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	2.91	3.89	4.42	13.6%	51.9%
Tangelos 2/	Box	-0.22	1.42	0.74	-47.9%	-436.4%
Tangerines 2/	Box	9.26	11.05	9.88	-10.6%	6.7%
Temples 2/	Box	1.28	4.89	2.05	-58.1%	60.2%
Apples, fresh 3/	Lb.	0.152	0.217	0.214	-1.4%	40.8%
Grapes	Ton	0	0	0	n/a	n/a
Peaches	Lb.	0	0	0	n/a	n/a
Pears, fresh 3/	Ton	252	282	276	-2.1%	9.5%
Strawberries, fresh	Lb.	1.07	1.34	1.06	-20.9%	-0.9%
Asparagus 4/	Cwt.	256	218	198	-9.2%	-22.7%
Broccoli 4/	Cwt.	32.3	55.3	75.8	37.1%	134.7%
Cantaloupes	Cwt.	0	0	0	n/a	n/a
Carrots 4/	Cwt.	16.7	19.3	19.3	0.0%	15.6%
Cauliflower 4/	Cwt.	37.5	65.5	40.7	-37.9%	8.5%
Celery 4/	Cwt.	15	10.1	17.4	72.3%	16.0%
Sweet Corn 4/	Cwt.	35.1	24.8	28	12.9%	-20.2%
Cucumbers 4/	Cwt.	0	0	0	n/a	n/a
Lettuce 4/	Cwt.	23.2	26.2	36.5	39.3%	57.3%
Onions 4/	Cwt.	14.1	9.48	8.39	-11.5%	-40.5%
Snap Beans 4/	Cwt.	69.4	58.7	58.5	-0.3%	-15.7%
Tomatoes 4/	Cwt.	288.7	40.5	26.8	-33.8%	-90.7%

1/ Preliminary.

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Weight per box of citrus.

Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.

Lemons: AZ, CA = 76 Lbs. per box.

Limes: Florida = 88 Lbs. per box.

Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.

Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.